Instructions for Entering CHRP Clients into ServicePoint

Last Updated 9/15/2020

Contents

Introduction

These instructions are meant to provide guidance to CHRP providers who are entering client information into ServicePoint. Instructions include the steps for each aspect of ServicePoint. In each section below, you will find step-by-step instructions followed by a version of the step-by-step instructions that includes a screen capture of that step.

Start to Finish Overview of Process

Overview of workflow process from start to finish – without a referral

1. Receive application with ServicePoint authorization, which permits you to enter the client's information into ServicePoint.
2. Log in to ServicePoint and check that the client does not already have an entry to another CHRP provider. If they have an entry, it will appear on the Client Profile in the Summary Tab.

Entry/Exits

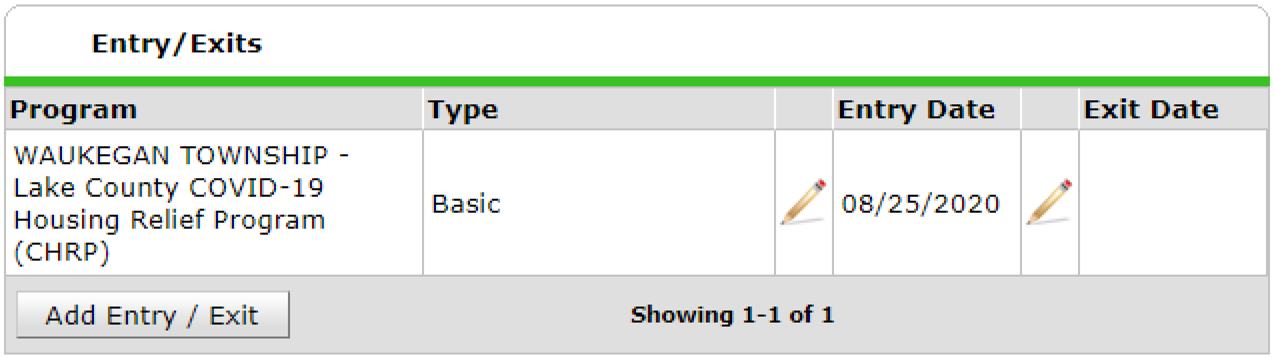
Program	Type		Entry Date		Exit Date
WAUKEGAN TOWNSHIP - Lake County COVID-19 Housing Relief Program (CHRP)	Basic		08/25/2020		

Add Entry / Exit   **Showing 1-1 of 1**

   a. If they do have an entry with another CHRP provider, please tell the client that they can only be served by one agency.
   b. If they do not have an entry, you may move forward with the process.
3. Review the application and confirm the client is eligible, all supporting documentation is present, etc.
4. **Create an entry** (instructions included in this document). If the client is not already in the database you may need to **add a client** (instructions included in this document). If the household is not already on the client's profile, you may need to **create a household** (instructions included in this document).
5. Once you have confirmed the rent and/or utility amounts with the landlord and/or utility companies and are ready to pay the service, **add a service** (instructions included in this document).
6. Once the service or services have been added, **create an exit** (instructions included in this document).

Overview of workflow process from start to finish – from a referral

1. Log in to ServicePoint and view the referral on your dashboard.
2. Call the client and **complete the referral** (instructions included in “SPRN Receiving a Referral” document).
3. Log in to ServicePoint and check that the client does not already have an entry to another CHRP provider. If they have an entry, it will appear on the Client Profile in the Summary Tab.


Entry/Exits

Program	Type		Entry Date		Exit Date
WAUKEGAN TOWNSHIP - Lake County COVID-19 Housing Relief Program (CHRP)	Basic		08/25/2020		

Add Entry / Exit — **Showing 1-1 of 1**

   a. If they do have an entry with another CHRP provider, please tell the client that they can only be served by one agency.
   b. If they do not have an entry, you may move forward with the process.
4. Receive application with ServicePoint authorization, which permits you to enter the client’s information into ServicePoint. Review the application and confirm the client is eligible, all supporting documentation is present, etc.
5. **Create an entry** (instructions included in this document). If you received the referral from 211, many of the fields will already be filled in.
6. Once you have confirmed the rent and/or utility amounts with the landlord and/or utility companies and are ready to pay the service, **add a service** (instructions included in this document).
7. Once the service or services have been added, **create an exit** (instructions included in this document).

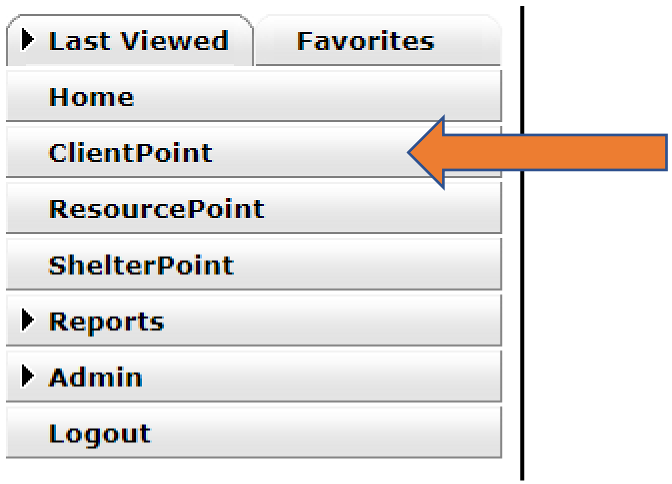
Step 1: Search Client

Steps:

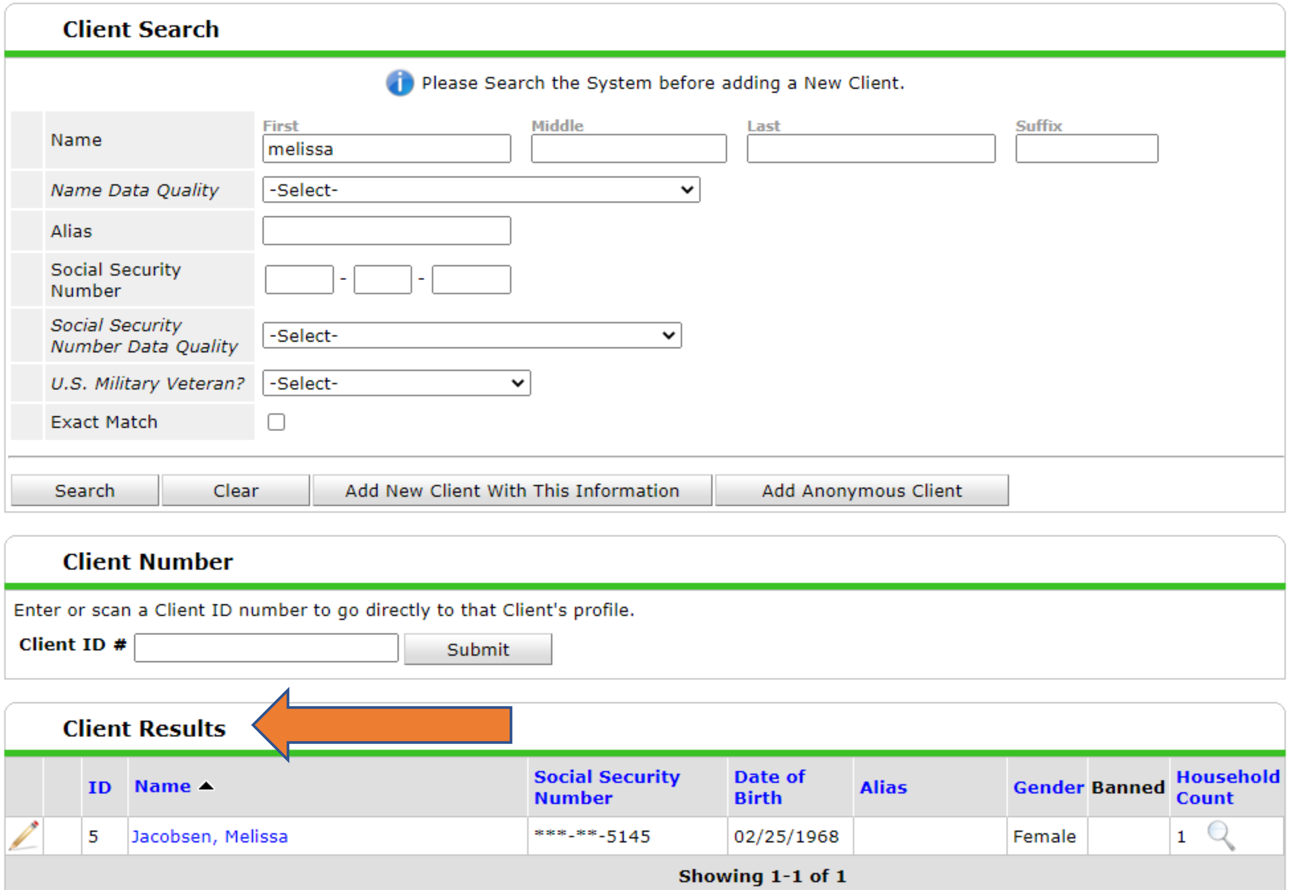
1. Click on ClientPoint.
2. Type in client name. Click Search.
3. If the client is in the database, they will appear under the "Client Results" section. If the client exists in the database, click on the client and continue to **Find a Household** below.
    a. If there is no result under the "Client Results" section, try searching the client by their Social Security Number or Date of Birth, in case they have an alias.
    b. If you are sure the client is not in the database, continue to **Add a Client** below.

Steps with Screen Capture:

1. Click on ClientPoint.



2. Type in client name. Click Search.
3. If the client is in the database, they will appear under the "Client Results" section. If the client exists in the database, click on the client and continue to **Find a Household** below.



a. If there is no result under the “Client Results” section, try searching the client by their Social Security Number or Date of Birth, in case they have an alias.
b. If you are sure the client is not in the database, continue to **Add a Client** below.

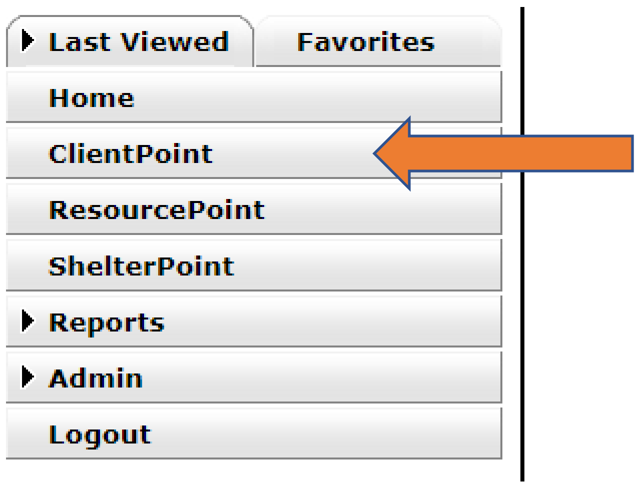
Step 2: Add a Client

Steps:

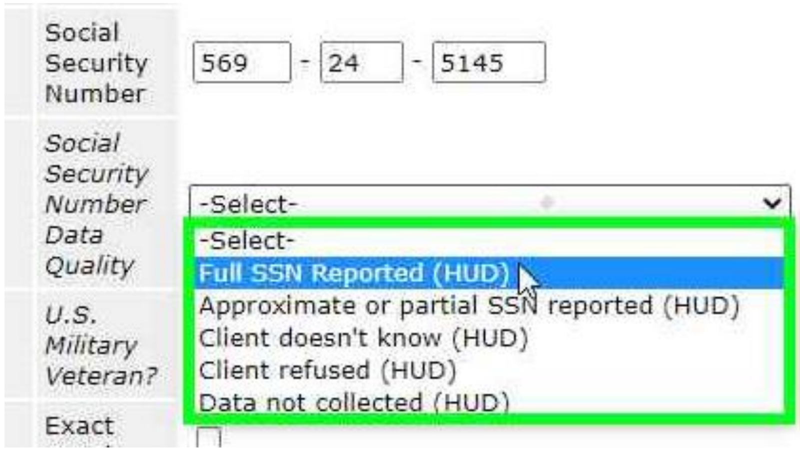
1. Click on ClientPoint.
2. Type in client name. Click Search. If you are sure the client is not in the database, you must add the client.
3. Add the client's name, Date of Birth, Social Security Number, Veteran Status. Complete each drop down as well. This information appears on the intake packet.
    a. For the Social Security dropdown, the client can report the last four of their SSN. They can also say they do not know or refuse to share the SSN. The SSN field is included in the intake packet, so do not select "Data Not Collected."
4. Click "Add New Client With This Information."
5. If the client is part of a household of more than one person, you will need to continue to **Create a Household** below. If the client is a household of one, continue to **Create Entry** below.

Steps with Screen Capture:

1. Click on ClientPoint.



2. Type in client name. Click Search. If you are sure the client is not in the database, you must add the client.
3. Add the client's name, Date of Birth, Social Security Number, Veteran Status. Complete each drop down as well. This information appears on the intake packet.
    a. For the Social Security dropdown, the client can report the last four of their SSN. They can also say they do not know or refuse to share the SSN. The SSN field is included in the intake packet, so do not select "Data Not Collected."



4. Click “Add New Client With This Information.”
5. If the client is part of a household of more than one person, you will need to continue to **Create a Household** below. If the client is a household of one, continue to **Create Entry** below.

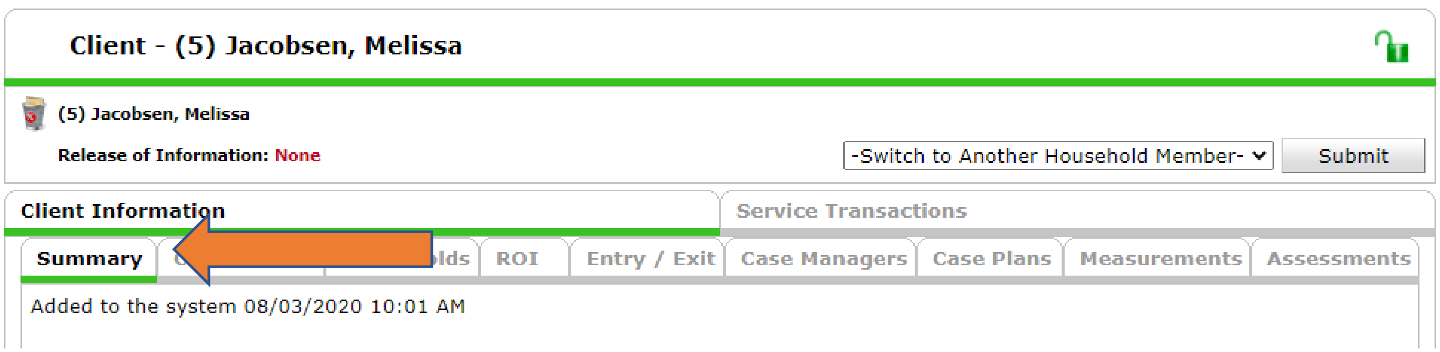
Step 3: Find a Household or Create a Household

Steps:

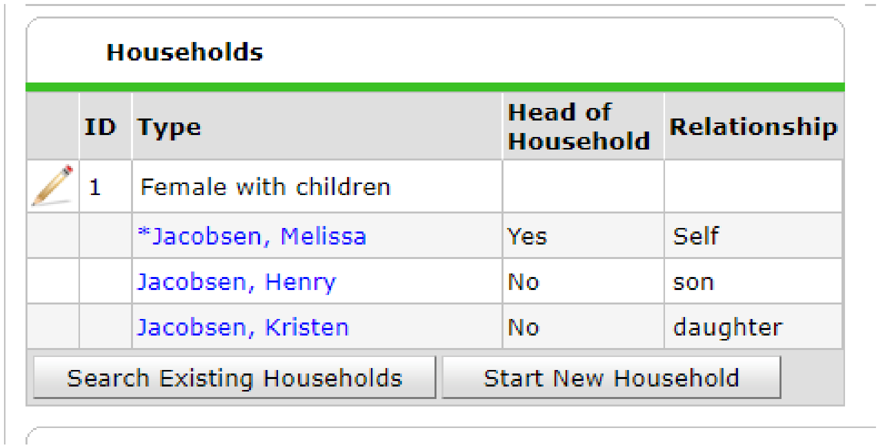
1. Click on the “Summary” tab in the client’s profile.
2. Check if the client’s household is listed under the “Households” tab.
    a. If there is a household that matches the client’s current situation, continue to **Create Entry** below.
3. If there is no household listed, click “Start New Household.”
4. Select a “Household Type” from the dropdown menu.
5. Search for the other household members under “Client Search.” If the other members of the household are in the database, they will appear under “Client Results”
6. If they do not show up under “Client Results,” click “Add New Client With This Information”
7. As you add household members, they will appear under “Selected Clients” alongside the original client.
8. Click “Continue.”
9. Fill in the “Household Members” information.
10. Click “Save and Exit.”
11. Continue on the **Create Entry.**

Steps with Screen Capture:

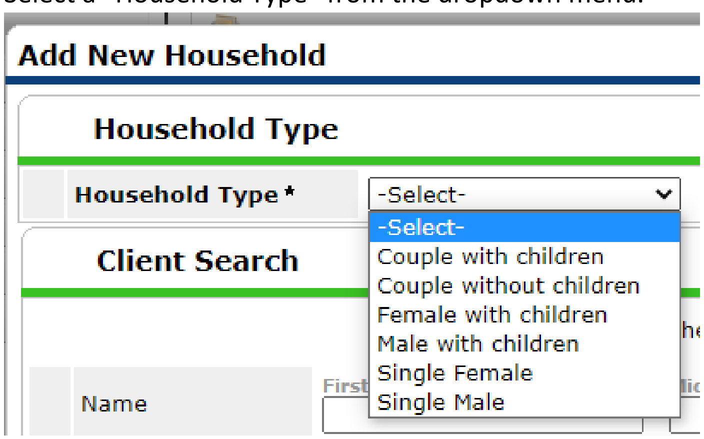
1. Click on the “Summary” tab in the client’s profile.



2. Check if the client’s household is listed under the “Households” tab.
    a. If there is a household that matches the client’s current situation, continue to **Create Entry** below.



3. If there is no household listed, click “Start New Household.”
4. Select a “Household Type” from the dropdown menu.



5. Search for the other household members under “Client Search.” If the other members of the household are in the database, they will appear under “Client Results.”

Client Results

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	6	Jacobsen, Henry	***-**-2365	06/19/1998		Male		1

Showing 1-1 of 1

6. If they do not show up under "Client Results," click "Add New Client With This Information."
7. As you add household members, they will appear under "Selected Clients" alongside the original client.

Selected Clients

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	6	Jacobsen, Henry	***-**-2365	06/19/1998		Male		1
	7	Jacobsen, Kristen	***-**-3698	04/18/2010		Female		1
	5	Jacobsen, Melissa	***-**-5145	02/25/1968		Female		1

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8. Click "Continue."
9. Fill in the "Household Members" information.

Household Members

	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
	(6) Jacobsen, Henry	22	No	-Select-	08 / 03 / 2020	0	2
	(7) Jacobsen, Kristen	10	No	-Select-	08 / 03 / 2020	0	2
	(5) Jacobsen, Melissa	52	No	-Select-	08 / 03 / 2020	0	2

Add/Delete Household Members | Household History Report

10. Click "Save and Exit."
11. Continue on the **Create Entry.**

Step 4: Create Entry

Steps:

1. Click on the “Summary” tab of the client’s profile.
2. Under “Entry/Exits,” click “Add Entry/Exit.”
3. Select the household that aligns with the client’s current situation.
4. Make sure the “Provider” selected is your agency’s CHRP provider profile.
5. For “Type,” select “Basic.”
6. The “Entry Date,” enter the date the client was accepted into the program. This is the date that agency staff reviewed the client’s application packet and determined they were eligible for the program.
7. Click “Save and Continue.” An “Entry/Exit Data” window will appear.
8. There are three tabs on the “Entry/Exit Data” window.
9. Fill out all sections for the “CHRP Entry #1” tab. Click “Save.”
    a. If the household already existed, there may be information in the “Monthly Income” section. If there is a source of income already listed that they no longer receive, do not delete the income source. Edit the income source by selecting the pencil icon.
    b. Add an “End Date” to indicate that the client no longer receives the income and click “Save.”
10. Click the “CHRP Entry #2” tab.
11. Fill out all sections and click “Save & Exit” button. Do not fill out anything on the “211 Referral Network Form” tab.
12. Continue to **Add a Service.**

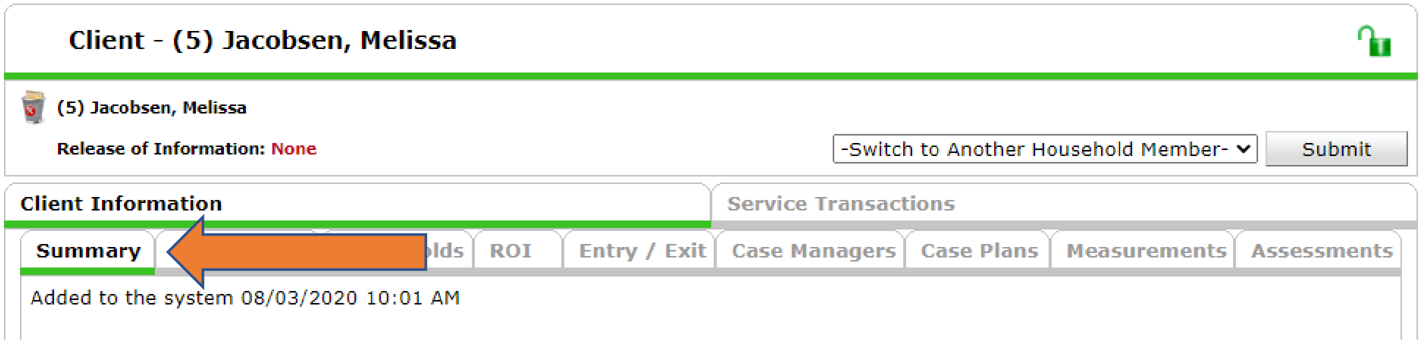
Note: When a client submits an application for multiple months of arrears, it is not necessary to have an entry for each month. Multiple months will be reflected with multiple “Services” entered. Only one entry should be added when the application is first accepted, and only one exit should be entered after the landlord or utility company is paid, even if the payment covers several months’ worth of arrears. However, a client may have multiple “entries” if they return for continued assistance. If a client receives less than the maximum amount of assistance on their initial application and the client returns in the future for additional assistance and submits a Self-Certification for Continued Assistance, the provider should add a new entry prior to adding a service and exiting the client. When this happens, the client may have multiple entries.

In other words:

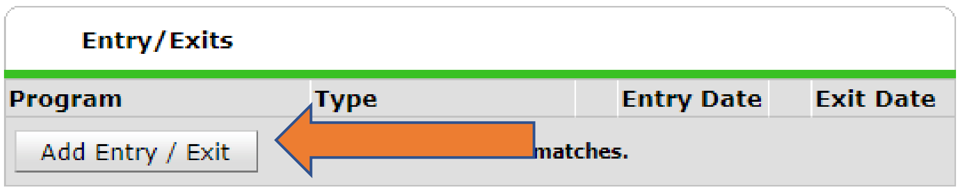
- For each Application processed there should be one Entry and one Exit
- For each Self-Certification for Continued Assistance processed there should be one Entry and one Exit
- For each *month* and *type* of service offered, there should be one Service. (example: In late July, a client receives rental arrears for June and July and rent for August, as well as gas arrears for June and July. This will be 5 services: June rent, July rent, August rent, June gas bill, July gas bill.)

Steps with Screen Capture:

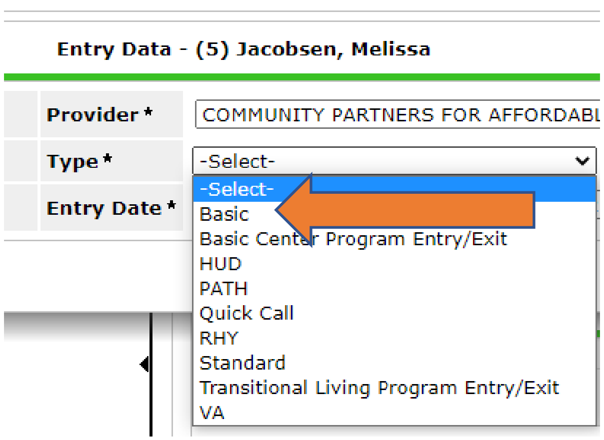
1. Click on the “Summary” tab of the client’s profile.



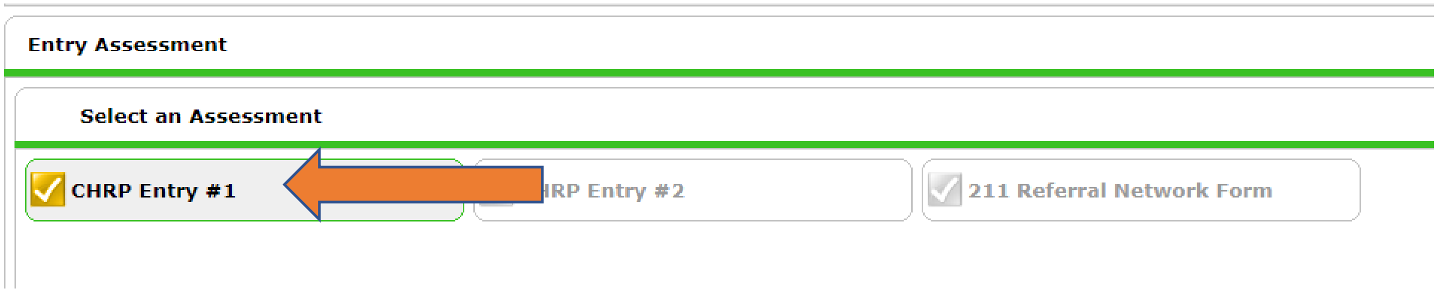
2. Under “Entry/Exits,” click “Add Entry/Exit.”



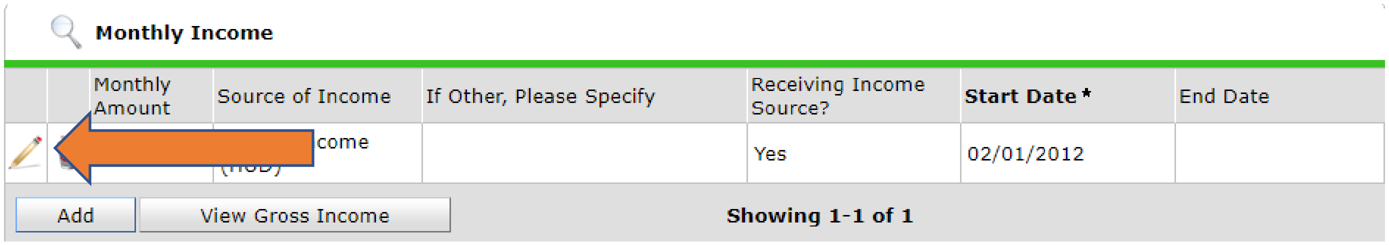
3. Select the household that aligns with the client’s current situation.
4. Make sure the “Provider” selected is your agency’s CHRP provider profile.
5. For “Type,” select “Basic”



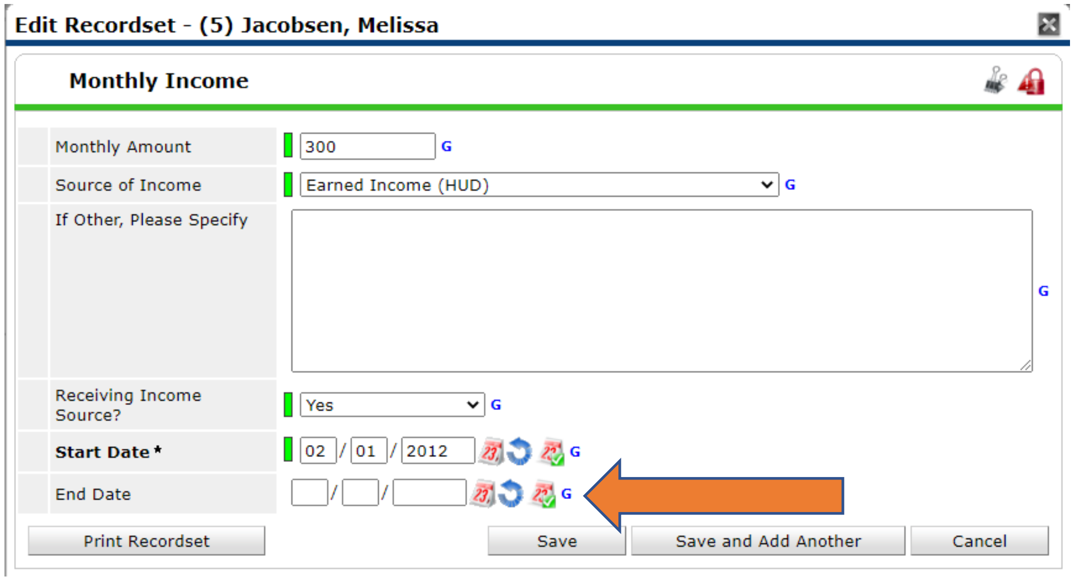
6. The “Entry Date,” enter the date the client was accepted into the program. This is the date that agency staff reviewed the client’s application packet and determined they were eligible for the program.
7. Click “Save and Continue.” An “Entry/Exit Data” window will appear.
8. There are three tabs on the “Entry/Exit Data” window.



9. Fill out all sections for the “CHRP Entry #” tab. Click “Save.”
    a. If the household already existed, there may be information in the “Monthly Income” section. If there is a source of income already listed that they no longer receive, do not delete the income source. Edit the income source by selecting the pencil icon.



    b. Add an “End Date” to indicate that the client no longer receives the income and click “Save.”



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12. Continue to **Add a Service.**

Note: When a client submits an application for multiple months of arrears, it is not necessary to have an entry for each month. Multiple months will be reflected with multiple “Services” entered. Only one entry should be added when the application is first accepted, and only one exit should be entered after the landlord or utility company is paid, even if the payment covers several months’ worth of arrears. However, a client may have multiple “entries” if they return for continued assistance. If a client receives less than the maximum amount of assistance on their initial application and the client returns in the future for additional assistance and submits a Self-Certification for Continued Assistance, the provider should add a new entry prior to adding a service and exiting the client. When this happens, the client may have multiple entries.

In other words:

- For each Application processed there should be one Entry and one Exit
- For each Self-Certification for Continued Assistance processed there should be one Entry and one Exit
- For each *month* and *type* of service offered, there should be one Service. (example: In late July, a client receives rental arrears for June and July and rent for August, as well as gas arrears for June and July. This will be 5 services: June rent, July rent, August rent, June gas bill, July gas bill.)

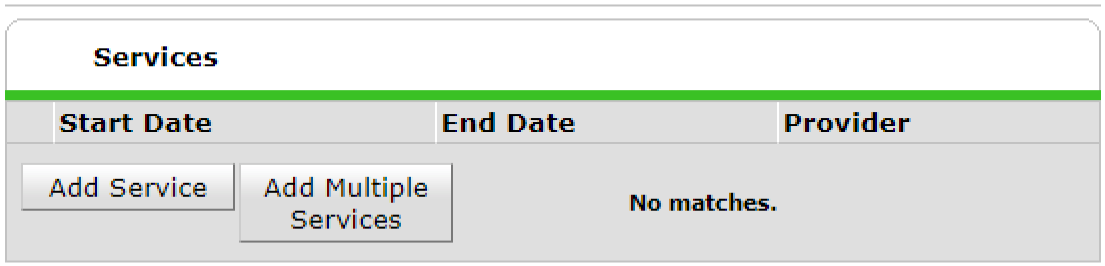
Step 5: Add a Service or Add Multiple Services

Steps:

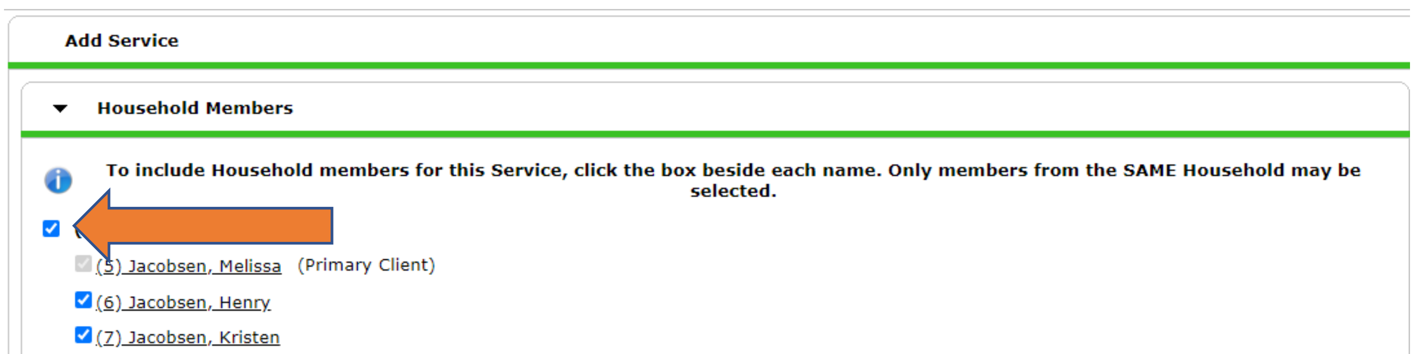
1. Once the payment for the service has been arranged and the provider knows the amount that will be paid for the rent, gas, or electric assistance, a service must be added to the client's profile. Search the client to find their profile and click on the "Summary" tab.
2. Scroll down until you see the "Services" section.
3. Click "Add Service." The "Add Service" page will open. You may also click "Add Multiple Services" if the client is receiving assistance that covers multiple months. Different service types like rent, gas, or electric, will have to be entered as separate services, not multiple services.
   NOTE: There should be one service for each month of payment for each service category the client receives. For example, if the client receives 2 months of arrears and 1 month of rent, there should be 3 services in ServicePoint. If the client receives 1 month of rent and 1 month of gas assistance, there should be 2 services in ServicePoint. Each service should have one funding source.
4. Select the household.
5. If you are adding multiple services, enter the Number of Services you will be entering.
6. The service start date should be the same as the service end date. The date should also be the date the payment was made to the landlord or utility company.
7. Under the "Service List" section, select the "Service Type" from the dropdown menu.
8. If you are adding one service, you will need to click "Save and Continue," and the "Edit Service" page will open.
9. If you are adding multiple services, you will proceed to the next steps without clicking "Save and Continue."
10. Skip the "Service Costs" section and scroll down to "Apply Funds for Service" section.
11. Click "Add Funding Source." If you are adding one service, this will open the "Add Funding Source" window.
12. Click the green plus sign next to "COVID-19 Housing Relief Fund (CHRP)."
13. Type in the dollar amount of the service under the "Funding Sources" section and click "Calculate."
14. If you are adding multiple services this dollar amount will apply to all three services. Do not add multiple funding sources here.
15. If you are adding one service, skip the "Support Documentation" and "Follow Up Information" sections. If you are adding multiple services, these sections will not appear. Under "Need Information," change "Need Status" to "Closed" and "Outcome of Need" to "Fully Met." This indicates that the service prevented the loss of housing.
16. Click the "Save & Exit" button.
17. If you are adding multiple services and need to adjust the cost of services for one or more of those services, click on the pencil next to the service, scroll down to the funding sources and adjust the amount next to the COVID-19 Housing Relief Fund.
18. Remember, there should be one service for each month of payment for each service category the client receives. For example, if the client receives 2 months of arrears and 1 month of rent, there should be 3 services in ServicePoint. If the client receives 1 month of rent and 1 month of gas assistance, there should be 2 services in ServicePoint.
19. Continue on to **Create Exit.**

Steps with Screen Capture:

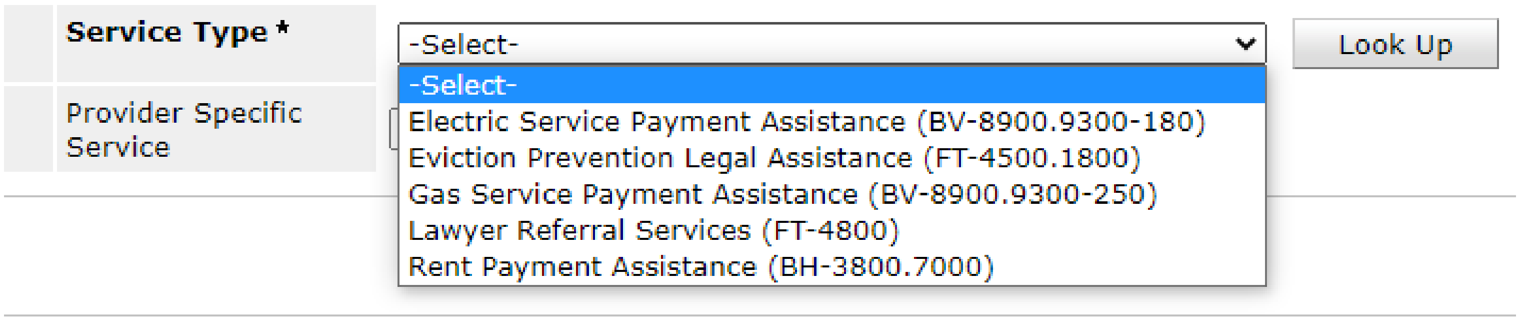
1. Once the payment for the service has been arranged and the provider knows the amount that will be paid for the rent, gas, or electric assistance, a service must be added to the client's profile. Search the client to find their profile and click on the "Summary" tab.
2. Scroll down until you see the "Services" section.



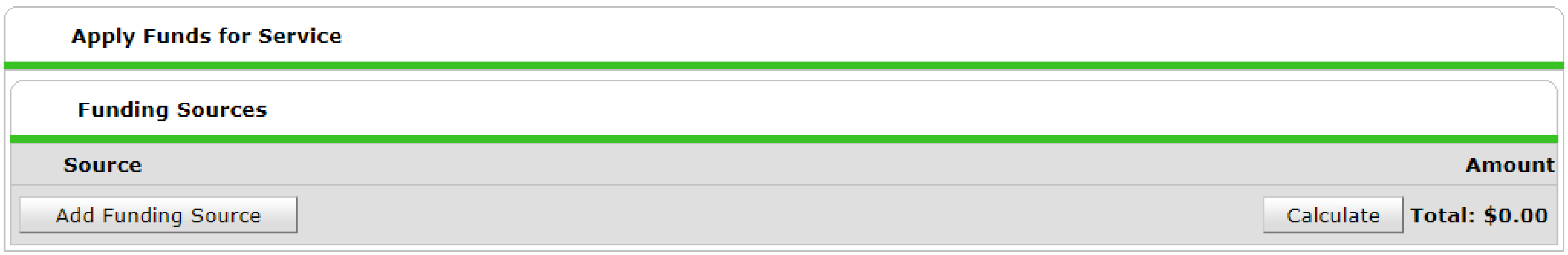
3. Click "Add Service." The "Add Service" page will open. You may also click "Add Multiple Services" if the client is receiving more than one type of assistance or assistance that covers multiple months.
NOTE: There should be one service for each month of payment for each service category the client receives. For example, if the client receives 2 months of arrears and 1 month of rent, there should be 3 services in ServicePoint. If the client receives 1 month of rent and 1 month of gas assistance, there should be 2 services in ServicePoint. Each service should have one funding source.
4. Select the Household.



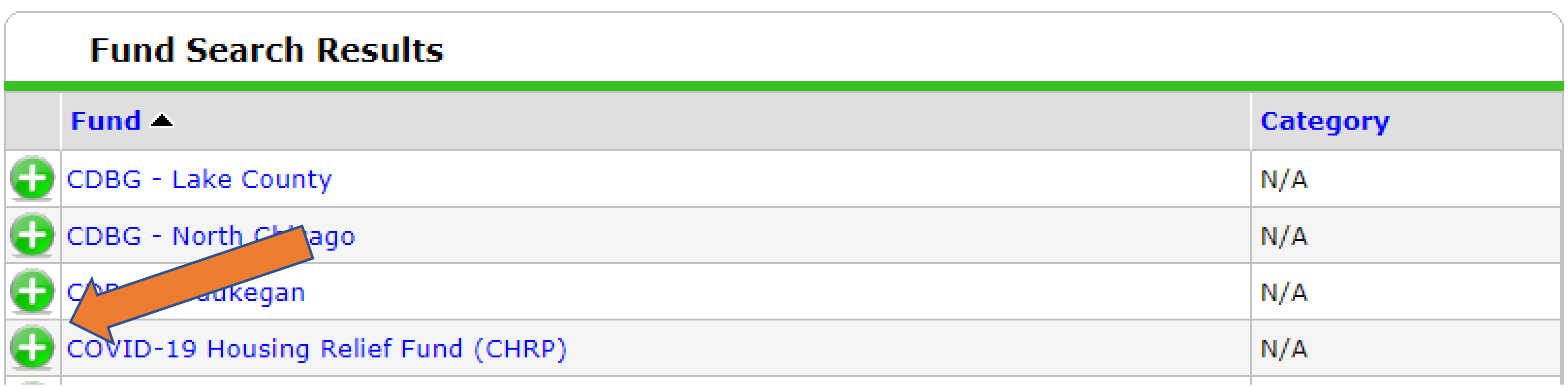
5. The service start date should be the same as the service end date. The date should also be the date the payment was made to the landlord or utility company.
6. Under the "Service List" section, select the "Service Type" from the dropdown menu.



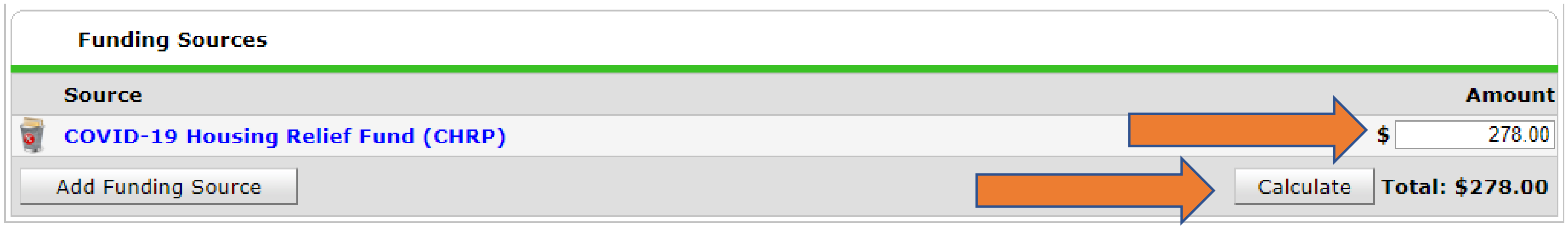
7. If you are adding one service, you will need to click “Save and Continue,” and the “Edit Service” page will open. If you are adding multiple services, you will proceed to the next steps without clicking “Save and Continue.”
8. Skip the “Service Costs” section and scroll down to “Apply Funds for Service” section.



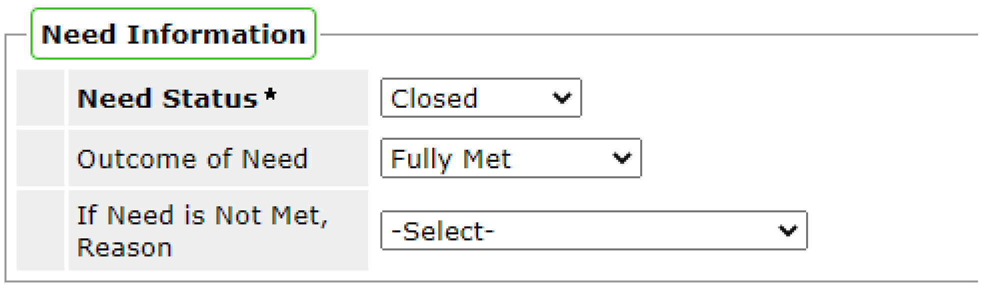
9. Click “Add Funding Source.” If you are adding one service, this will open the “Add Funding Source” window.
10. Click the green plus sign next to “COVID-19 Housing Relief Fund (CHRP).” If you are adding one service, this will close the window.



11. Type in the dollar amount of the service under the “Funding Sources” section. And click “Calculate.”



12. If you are adding one service, skip the “Support Documentation” and “Follow Up Information” sections. If you are adding multiple services, these sections will not appear. Under “Need Information,” change “Need Status” to “Closed” and “Outcome of Need” to “Fully Met.” This indicates that the service prevented the loss of housing.



13. Click the “Save & Exit” button. Remember, there should be one service for each month of payment for each service category the client receives. For example, if the client receives 2 months of arrears and 1 month of rent, there should be 3 services in ServicePoint. If the client receives 1 month of rent and 1 month of gas assistance, there should be 2 services in ServicePoint.
14. Continue on to **Create Exit.**

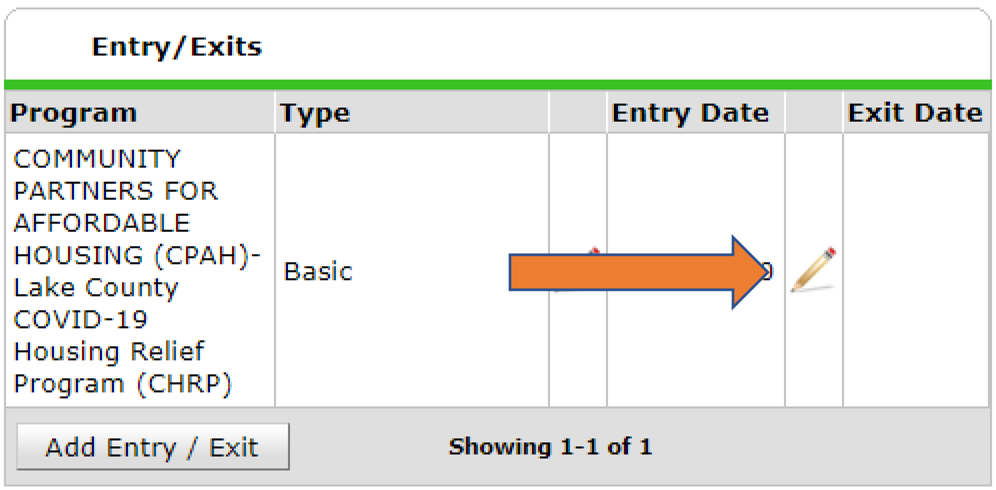
Step 6: Create Exit

Steps:

1. Under the client profile “Summary” tab, scroll to the “Entry/Exit” section and look for the entry that was created.
2. Click the pencil under “Exit Date.”
3. Select the household.
4. Enter the same date as the service date.
5. Select the “Reason for Leaving” from the dropdown menu. The reason should be “Completed program.”
6. Select the “Destination” from the dropdown menu. For most clients, the destination will be “rental by client, no ongoing housing subsidy;” however, some clients may be in other situations. For example, a homeowner that received gas bill assistance would be “owned by client, no ongoing housing subsidy.”
7. Click “Save & Continue.” The “Entry/Exit Data” window will open. Click “Exit.”

Steps with Screen Capture:

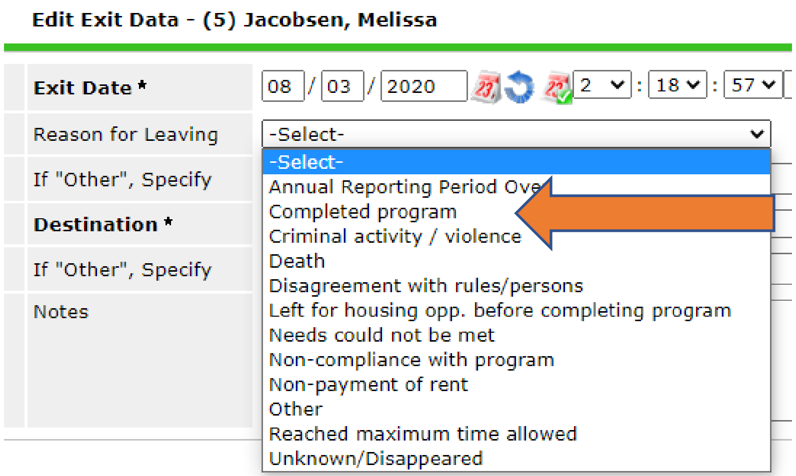
1. Under the client profile “Summary” tab, scroll to the “Entry/Exit” section and look for the entry that was created.


Entry/Exits

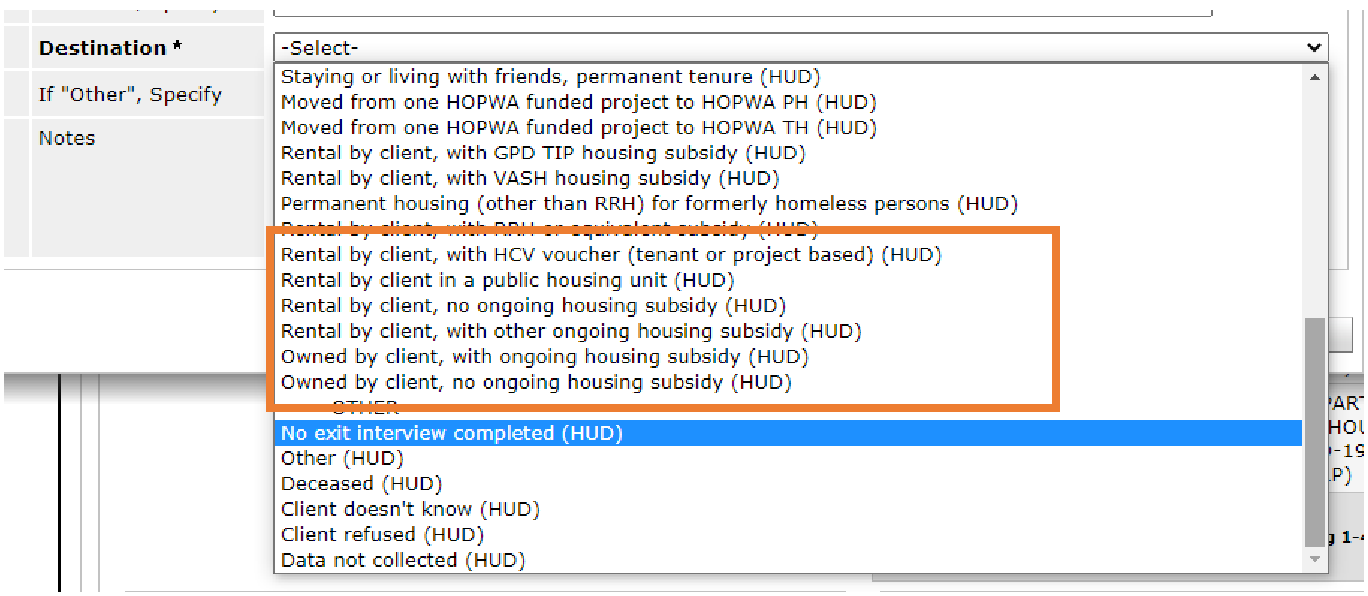
Program	Type		Entry Date		Exit Date
COMMUNITY PARTNERS FOR AFFORDABLE HOUSING (CPAH)- Lake County COVID-19 Housing Relief Program (CHRP)	Basic				

Add Entry / Exit — Showing 1-1 of 1

2. Click the pencil under “Exit Date.”
3. Select the household.
4. Enter the same date as the service date.
5. Select the “Reason for Leaving” from the dropdown menu. The reason should be “Completed program.”



6. Select the "Destination" from the dropdown menu. For most clients, the destination will be "rental by client, no ongoing housing subsidy;" however, some clients may be in other situations. For example, a homeowner that received gas bill assistance would be "owned by client, no ongoing housing subsidy."



7. Click "Save & Continue." The "Entry/Exit Data" window will open. Click "Exit."

Frequently Asked Questions

What is “Enter Data As”?

Your user profile is associated with a default program (provider profile). If your account receives referrals for multiple programs (provider profiles), you will need to tell ServicePoint which program you are representing when responding to referrals. When you receive a referral to a program that is not your default:

1. Click the “Enter Data As” button in the upper right-hand corner of your screen. This will open an “Enter Data As Provider Search” window with a list of all the providers your user account is associated with.
2. Click the green plus sign button next to the provider you wish to represent.
3. From there, when you click on the client’s ID number from your counts report, you will be able to see and edit incoming referrals to that program.
4. To return to your default program, click the name next to “Enter Data As” on the upper right-hand corner of your screen. When the name disappears, this means you have returned to your default provider.

Please note that ServicePoint will return to your default provider each time you log in.

Where is the client’s phone number?

The phone number is on the “Summary” tab of the client’s profile.

1. Log in.
2. If your user account is associated with multiple provider profiles,
    a. Click “Enter Data As” in the upper right-hand corner of the screen
    b. Click the green plus sign next to the name of the provider where the referral was sent.
3. Click the blue number under “Outstanding Incoming Referrals” on your Counts Report.
4. Click the blue client ID.
5. This should take you to the Client Profile “Summary” tab. If not, click the “Summary” tab.
6. Scroll down to “Referral Network Form.” The number is in the Cell Phone field
7. After calling, find the “Outstanding Incoming Referrals” and click the pencil next to the referral to complete it.

I don’t see an outstanding incoming referral on the client’s profile.

If a referral appears on your dashboard but you don’t see a referral under the Outstanding Incoming Referrals dashlet on the client’s profile, the referral most likely went to a provider profile that your user profile is associated with that is not your default provider, and you will need to “Enter Data As.” To figure out which provider profile the referral was sent to:

1. Click Home.
2. Click the blue number under “Outstanding Incoming Referrals” on your Counts Report.

3. Scroll to the right until you see a “Referred To” column. This is the provider profile you need to be entering data as when responding to the referral.
4. Follow the “Enter Data As” instructions above.

If you still can’t see the phone number, contact

I see the “Referral Network Form” on the client’s profile, but the phone number field is empty.

Send an email to imarshelmer@lakecounyil.gov with the client id and the name of the agency that sent the referral.

I completed a referral, but I accidentally put the wrong outcome. How do I edit it?

To change a referral outcome:

1. Find the client by either:
    a. Clicking on the “Incoming Closed Referrals” number on your Counts Report and selecting the Client ID. OR
    b. Searching for the client through ClientPoint and opening their profile.
2. At the top of their screen, click on the “Service Transactions” tab.
3. Click “View Entire Service History.”
4. Click on “Referrals” tab.
5. Click on the pencil icon next to the referral you want to update.
6. After making changes, click “Save & Exit.”

I accidentally added a service or too many services. How do I delete one?

1. From the client’s profile, click the “Service Transactions” tab.
2. Click the “View previous service transactions” button.
3. Select the “Services” tab.
4. You should see a list of all the services the client has received. From there, you can click on the trashcan icon next to any service that was entered in error. Please be careful not to delete any services added by other agencies, as a deletion can’t be undone.

Please note that if the household has multiple family members, the service will need to be deleted from each household member.

The client is not eligible for services. How do I make a note on their profile for future reference?

A “Service” should only be added if the client receives funding from the provider. If they aren’t eligible for funding, and you’d like to make a note on their profile, there is a “Client Notes” section that will only be visible to users at your agency.

1. Search the client in ClientPoint.
2. Select their name from the results.
3. Click on the “Client Profile” tab.
4. Scroll down to “Client Notes”
5. Click “Add New Client Note.”